

Success Story

DATALEX REDUCE TIME SPENT UPDATING DATABASES BY HALF

Through streamlining processes Datalex have improved marketing data, reporting and human error risk.



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Theresa Quinn - Marketing Manager at Datalex

INTRO

Datalex is a leading provider of travel distribution and merchandising software solutions for global travel retailers.

Established in 1985, Datalex now has 160 employees and provides software to some of the leading travel suppliers in the world, including Delta Air Lines, United Airlines, Philippine Airlines, STA Travel, WestJet, Frontier Airlines, Aer Lingus, Air China and South African Airways.



ENHANCED VIEW OF DATA AND COMMUNICATION HISTORY



REDUCED ADMIN TIME



REDUCED HUMAN ERROR

OUTGROWING MICROSOFT OFFICE TOOLS

As a purely B2B organisation, the sales and marketing function at Datalex is primarily focused on research, networking and ensuring that communications are professional, effective and consistent with customers and prospects in what can, in many instances, be a lengthy and involved sales process.

Up until about four years ago, the Datalex database was small, and was easily managed using the Microsoft Office tools available. In subsequent years however, the organisation significantly developed its marketing activities and external communications. This led to a more structured customer communication strategy, with a growing database of customers, prospects and other industry contacts.

The Microsoft tools that Datalex were using became too unwieldy to manage this growth. The marketing team were solely responsible for updating the database and with a growing database, growing sales team, and limited marketing resources, sharing data became imperative to Datalex in order to allow the sales reps who owned the data to manage and maintain records in a way that complemented existing internal sales processes.

“KEEPING THE DATABASE CLEAN AND CURRENT BECAME A LABOUR INTENSIVE PROCESS, WE WANTED A SYSTEM THAT COULD PROVIDE THE SALES AND MARKETING TEAMS WITH A CONSISTENT VIEW OF THE DATABASE AND ENABLE THE SALES TEAM TO MANAGE THEIR OWN RECORDS, THUS REDUCING THEIR DEPENDENCE ON LIMITED MARKETING RESOURCES TO KEEP THE GROWING DATABASE UP-TO-DATE.”

Theresa Quinn - Marketing Manager at Datalex

Using Microsoft Office tools, it was difficult to standardise the way that information was recorded, what's more data was not managed in a consistent way. It also became cumbersome to collate and report on data that was interrelated, but managed in separate applications that were not integrated.

In addition, the marketing team at Datalex had no effective way to manage, execute and monitor email marketing campaigns and trade events. Theresa explained, “Prior to Workbooks we had no processes set in place to record and monitor our marketing campaigns, or the activities related to them, and calculating the ROI that a particular campaign or trade event had generated was more onerous than we wanted it to be.”

SELECTING WORKBOOKS CRM

Datalex shortlisted three CRM providers. Theresa explains why Workbooks came out on top:

“WORKBOOKS WAS THE MOST COST-EFFECTIVE VENDOR THAT WE SHORTLISTED AND, MOST IMPORTANTLY, THE WORKBOOKS INTERFACE WAS THE MOST USER-FRIENDLY WHILE BEING FLEXIBLE. THIS WAS AN IMPORTANT CONSIDERATION AS THE DATALEX STAFF ALREADY USED MANY APPLICATIONS FOR OTHER PURPOSES ON A DAILY BASIS AND NOT ALL WERE FAMILIAR WITH CRM.”

Theresa Quinn - Marketing Manager at Datalex

STREAMLINED PROCESSES FOR DATA MANAGEMENT

With Workbooks, Datalex now has one fully integrated cloud based system to manage all of the data and communication history for their customers, prospects and industry contacts.

Theresa says: “It is incredibly useful having one system in which we can manage our entire database of information relating to individuals and their organisations.”

She continued, “Workbooks provides our sales team with a central source from which to access all of this information and it has reduced the overall time spent updating the database by half. Previously sales staff sent data to marketing who would update the database but now this process is direct and all users take responsibility for inputting and managing the data in the system.”

Theresa continued: “Workbooks has also reduced the scope for human error. The Workbooks fields and forms minimise the risk of errors being made and the powerful reporting tools make it easy for us to quickly identify and rectify them when they do occur.”

MORE EFFECTIVE MARKETING

Workbooks allows Datalex to manage marketing campaigns from start to finish, providing the marketing team with the tools they need to segment their data, create distribution lists, and monitor invitees, responses and attendance.

Theresa says: "With Workbooks we now have better visibility of campaigns such as trade events and e-campaigns. This includes visibility of historic information such as the original source of a contact, which events they attended, and feedback to e-campaigns. Senior management can also see this information and manipulate it to report on SLAs and KPIs."

EASE OF USE AND FLEXIBILITY

"It was important to us that we found a CRM that was easy to use. The Workbooks user interface is so intuitive that minimal training was required to get our team up and running," says Theresa.

"We are impressed by how flexible the CRM system is. This means that it can be adapted to capture and manage data that is key to our business requirements, and our internal sales processes, rather than having to change these to suit the system."

About

INDUSTRY

IT & Telco

NUMBER OF EMPLOYEES

51-200

IMPLEMENTATION DATE

April 2012

TECHNOLOGY

- Workbooks CRM
- Outlook Connector

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